



DFX

# Plan, execute, and track strategic charitable giving

DFX is a platform designed to manage charitable giving through donor-advised funds. With features made for the sophisticated investment community, DFX makes it easier for advisors to incorporate philanthropy into their clients' overall portfolio while also allowing clients a convenient way to manage their donor-advised fund giving.

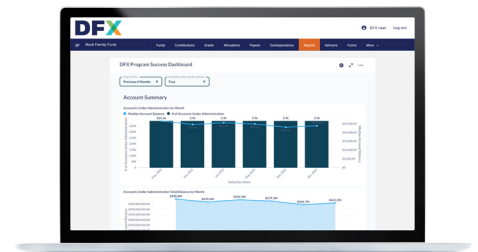
The platform is dynamic, mobile-responsive, and cloud-based, which provides users with a secure, configurable, and socially powerful interface. It can integrate safely with other systems that help drive more philanthropic giving and charitable dollars.

## Intuitive interface

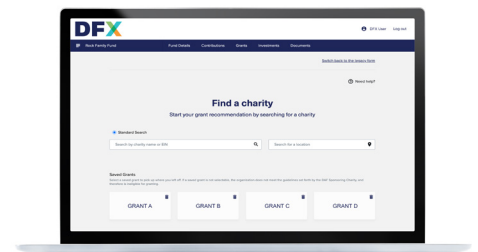
DFX was designed with the donor in mind. With an intuitive interface, donors can easily find their favorite charities, make contributions, recommend grants, and view their accounts.

## Benefits of DFX:

- View complete account information, grant and contribution transactions, and history
- 24/7 online access to enter grants and contributions
- Simple, intuitive design to encourage more giving
- Updated account balance and investment holdings
- Ability to pursue and research charities and give to any qualifying nonprofit
- Industry-leading security measures to protect privacy, including SOC2 compliance
- Reconfigurable dashboard view with graph displays and metrics
- Access to educational content for advisors and donors



View account reports



Find charities

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